

Women Investors: Your story. Your future.

## Taking Stock Worksheet

One of the keys to a successful financial future is to determine your future goals, assess your current circumstances, and seek the guidance you need to get there. Below are some questions that can help you get started and, with the assistance of an investment professional, devise a plan to help achieve financial security.

### Step 1: Define personal goals

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What are your top three personal goals?

Goal 1:

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Goal 2:

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Goal 3:

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Some common personal goals may include:

#### **Family**

- Spend more time with loved ones
- Pay for a child's post-secondary education
- Provide a unique experience for my family (e.g. trip)

#### **Professional life**

- Retire in X years
- Advance/change career or start a business
- Complete a course or degree

#### **Health and well-being**

- Improve my health
- Reduce stress
- Volunteer

#### **Financial independence/security**

- Retire when I want
- Become debt-free
- Afford trips, a second home, etc.

#### **Home**

- Move to a new location
- Buy a vacation property
- Become mortgage-free

#### **Lifestyle**

- Travel
- Hobbies

#### **Legacy**

- Leave an estate to heirs
- Philanthropy

## Step 2: Take stock

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Now let's take note of some of the most important details about your life that can assist in building a financial plan. Each category below provides sample questions for your consideration as you take stock of your personal circumstances.

### Considerations

### Your story

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#### Family

- Describe the composition of your family
- Is your family currently facing any significant challenges?
- Do you have specific family goals?

#### Career/work

- Describe your current work circumstances
- Do you have a plan in place if your current source of income was no longer available?
- Do you have plans to leave your current job?

#### Well-being

- Do you or anyone in your family have health concerns that may impact your finances?
- Do you have plans for protecting your family from an unexpected life event like illness or death?
- How would your finances be impacted by parent or child care requirements?

#### Finances

- What is your most important question or concern regarding your finances?
- When did you last update your financial plan?
- Do you have savings to cover an emergency or unexpected expense?
- Have you reviewed your insurance needs?
- Do you have a will or estate plan?

#### Home

- What is the current mortgage outstanding on your home?
- Do you have plans to move or renovate?
- Do you plan on living in your home after you retire?
- Do you plan to continue living in your home if there was a change in health of you or a loved one?

## Considerations

## Your story

### Lifestyle

- What activities do you currently enjoy or plan to enjoy in the future?
- Do you see your lifestyle changing in the next 10 - 20 years?
- Have you estimated the cost of fulfilling your future lifestyle?

### Other considerations

## Step 3: Take action

Prioritizing your goals and formulating a plan on how to achieve them provides a better chance of making them a reality. Based on the assessment of your personal circumstances in Step 2, have your goals changed? If so, rank your goals in priority with the help of an investment professional.

By completing this section, you're taking the first step towards creating an investment plan that can help you achieve financial security.

## Financial goals

## Action + timing

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## Next steps

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As your personal circumstances evolve, it's important to have a plan in place that is aligned towards helping you achieve your financial goals. Once established, through regular touchpoints with an investment professional, you'll be able to reaffirm your personal goals and update your financial plan to ensure it grows along with you throughout different life stages.

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**For additional information** on how you can work towards helping to secure your financial future, please book an appointment with an investment professional.

<sup>1</sup>Banking 500 2017: The most valuable banking brands of 2017 Brand Finance.

<sup>2</sup>The Top Money Managers (as of December 31, 2016) Benefits Canada, May 2017.

<sup>3</sup>TD Asset Management Inc. TD Low Volatility Strategies Smart Beta Report (0116).

<sup>4</sup>TDAM Mutual Fund Industry – Preliminary Net Sales Period ending December 2017.



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